

**Section 6**

**Technology**

**6.1 Intent**

The Sunshine Reform Task Force (SRTF) recommends that technology be used to support, improve and further open government, transparency and access to public records.

**6.1.1 Systems and Infrastructure**

**6.1.2 Electronic Document and Web Content Management Systems**

The SRTF supports the speedy funding and deployment of an Electronic Document Management System and a Web Content Management System to better manage documents and Web content. Electronic management and retrieval of documents are necessary to support sunshine reforms and will give the community and staff faster access to critical information while reducing document printing, storage and retrieval costs.

**6.1.3 Ticketing Requests for Public Records**

The SRTF recommends that when the City Manager's Office, City Clerk's Office, City Attorney's Office, Police Department, Planning Department or the City's Public Information Officer receives a request for public records that requires more than one day to complete, a "ticket" with a unique number be opened to track the request through a program similar in functionality to a Help Desk Ticket System. When the request is fulfilled, the SRTF recommends that the ticket be closed.

**6.1.4 Displaying and Recording Votes at Council Meetings**

- A. The SRTF recommends that the City use its technology to display the specific votes of the Councilmembers and the Mayor to (1) the audience in the Council Chambers; and (2) on the video broadcast of the Council Meeting.
- B. The SRTF recommends that the City implement a searchable database of each vote by Councilmembers and Mayor and maintain the records of such votes in a manner accessible to the public via the Web as a permanent archive.

### **6.1.5 Public Safety and Law Enforcement**

- A. The SRTF recommends that the City's Law Enforcement agencies pursue development or acquisition of a Records Management System that has the capability to redact information consistent with the recommendations of the Public Records Subcommittee of the SRTF and the California Public Records Act.
- B. The SRTF commends the City's Police Department for developing one of the better systems for viewing, by neighborhood, information about calls for service. The SRTF recommends that the City continue to advance its system by clearly labeling crime types (rather than using codes) and providing more comprehensive information about the disposition of the call for service. The SRTF recommends that the system will evolve to include the summary field of the report made about the call for service.

## **6.2 Web site**

### **6.2.1 Navigation and Organization**

- A. The SRTF recommends that users be able to navigate easily all of the City's web sites to find information. The SRTF supports the City in making technology improvements that will enhance the "searchability" of the City's web sites.
  - 1. The SRTF recommends that the City's web site's search engine include all web sites associated with the City and its Departments.
  - 2. The SRTF recommends that the City's web site's site map be organized so that major content areas are identified.
  - 3. The SRTF recommends that the City and all City Departments employ "breadcrumb trails" at the top of each page so that citizens can more easily find information and see where a page is located in the web site hierarchy. (Example: Home page → Section page → Subsection page.)
- B. The SRTF recommends that City web sites be organized in a consistent manner:
  - 1. Front Page

The SRTF recommends that the City conduct a "usage assessment" to determine how users use the City's web site and the web sites of the City's Departments. The SRTF recommends that the most frequently used functions and most frequently viewed pages be placed on the front page of the City's web site. The usage assessment should not delay implementation of any other SRTF recommendations.

## 2. Header

- a. The SRTF recommends that the City and each Department maintain a consistent header and navigation menu, whenever possible.
- b. The SRTF recommends that each Department's home page link to the home page of the City.
- c. The SRTF recommends that the City's "logo" in the header be "clickable" and return the user to the City's home page.

## 3. Contact Information

The SRTF recommends that every City Department home page include, in the same place for each Department, the name of the Department Head, the address and telephone number for the Department, an email contact form or address, and a link to obtain a map and directions to the Department's offices.

## 4. Footer

The SRTF recommends that the City and each Department maintain a consistent footer that includes the City's privacy policy, terms of use and webmaster contact information.

## 5. Titling

The SRTF recommends that the City and each Department use a consistent scheme for page titles, which includes the name "City of San Jose" and describes, generally, the content on each page. The SRTF recommends that acronyms be avoided unless they are well known to the general public.

## 6. Links

The SRTF recommends that hypertext links be consistently identified as such, by underlining and use of a consistent color that differentiates them from other text on the page.

## 7. Software Download

The SRTF recommends that the City and each Department include visible links or icons on each page that contains links to documents in a format other than HTML to enable users to download software readers for the posted files.

## 8. Other Languages

The SRTF recommends that the City and each Department maintain links to information in other languages when a translation is available.

### **6.2.2 Web site Content**

- A. The SRTF recommends that City web sites contain a glossary to acronyms used on the web site.
- B. The SRTF recommends that “Alt Tags” be used on graphics to promote accessibility.
- C. The SRTF notes that the City has made an effort to present a unified portal for bids and proposals. The SRTF recommends that the City make further efforts to present clearly labeled links to all opportunities for bids and proposals, including, but not limited to considering redundancy in and consolidation of the various applications.

### **6.2.3 Interactive Services (including eGovernment)**

- A. The SRTF recommends that users be able to sign up and subscribe to content areas on the City’s web site to enable citizens to receive updates or alerts about issues that interest them. Areas of interest may include departments, council districts, neighborhoods or other subjects.
- B. The SRTF recommends that the City standardize the user interface for the approximately 98 different “contact us” forms on the City’s web sites.
- C. The SRTF also recommends that the City implement a “contact us” form for the public to use to contact via one email all members of the City Council or any City Board, Commission or Committee. The SRTF recommends that the contact form make at least the following disclosures: (1) the form may not necessarily be responded to; (2) if the comment relates to a Council Agenda item it will be included in the Public Record that goes to the Rules Committee, subject to the City’s E-Government Policy, Statement of Purpose, Privacy and Disclosure Statement, Security Statement and Disclaimer Statement; and (3) if the comment is a complaint about an issue in a specific District, the complaint should be made to that particular Councilmember. Moreover, the SRTF recommends that anyone be able to subscribe to the form-based email to receive all comments.

## **6.3 Procedures and Best Practices**

### **6.3.1 Posting, Archiving, Access and Document Retention Policies**

#### **6.3.1.010 Posting Documents (Including Indexes and Policies)**

- A. The SRTF recommends that every City Department maintain an index, linked from the Department's home page, of every report with supporting documents made to the City Council or a Council Committee.
- B. The SRTF recommends that the following documents be posted online permanently:
  - 1. Budgets (Citywide Retention Schedule, Series No. 308);
  - 2. Community Development Block Grant Program – Approved Grants (Housing Retention Schedule, Series No. 195);
  - 3. Community Development Block Grant Program – Program Audits (Housing Retention Schedule, Series No. 197);
  - 4. Project Development – Loan Underwriting (Housing Retention Schedule, Series No. 209) – \$1 million and over;
  - 5. Project Development – Outside Funding (Housing Retention Schedule, Series No. 210) – \$1 million and over;
  - 6. List of persons earning the highest 100 salaries, along with their compensation;
  - 7. List of salaries by classification;
  - 8. Reports – Quarterly or Midyear (IPA Retention Schedule, Series No. 182);
  - 9. Newsletters – Quarterly or Mid-year (IPA Retention Schedule, Series No. 183);
  - 10. Police Department Audit – Annual Operational Audit (IPA Retention Schedule, Series No. 185); and
  - 11. Studies – Statistical Analysis Studies and Reports, Surveys (External and Internal) (IPA Retention Schedule, Series No. 186).

#### **6.3.1.020 Archiving Documents**

##### **A. Email Archive Recommendations**

1. The SRTF recommends that the City immediately begin archiving the email of elected officials and non-clerical staff to elected officials that relates to the conduct of the City's business for 10 years.
2. The SRTF recommends that the City pursue a solution to archive, at a minimum, email of all City employees who file the Form 700 – Statement of Economic Interests that relates to the conduct of the City's business for 5 years.

##### **B. The SRTF recommends that the City maintain a permanent electronic archive of documents related to Council Agenda items.**

#### **6.3.1.030 Retention Schedules**

The SRTF recommends that the City publish an index to City records and associated retention schedules for those records. The SRTF also recommends that changes to a retention schedule be reviewed at an open and public meeting of both the Open Government Commission and the City Council.

#### **6.3.2 Records Manager and Other Staffing Requirements**

The SRTF supports the City's efforts to hire a Public Records Manager and encourages the City to do so as quickly as possible.

#### **6.3.3 Privacy**

The SRTF recommends that the City follow a privacy policy, which is referenced in the footer of every web page, that ensures that home and email addresses are redacted from any information made public. The SRTF recommends further that Social Security Numbers, if required, be obtained on a document that is maintained separately from any contract that may be made public.